



NCO-ER
SFC/MSG/SGM Promotion Board Statistics
And Checklist
Field Artillery Proponency Brief

2 May 03

NCO-ER



NCO EVALUATION REPORT										SEE PRIVACY ACT STATEMENT ON AR 623-205, APPENDIX C.					
PART I - ADMINISTRATIVE DATA															
a. NAME (Last, First, Middle Initial)						b. SSN		c. RANK		d. DATE OF RANK					
e. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND						f. REASON FOR SUBMISSION									
b. PERIOD COVERED				1. RATED MONTHS		2. NON-RATED CODES		3. NO. OF ENCL.		4. RATED NCO COPY (Check one and Date)					
FROM		THRU								5. PEC include					
YYYY	MM	YYYY	MM							6. CMO CODE					
										7. PSB CODE					
PART II - AUTHENTICATION															
a. NAME OF RATER (Last, First, Middle Initial)						SSN		SIGNATURE							
RANK, PMOS/CBRANCH, ORGANIZATION, DUTY ASSIGNMENT								DATE							
b. NAME OF SENIOR RATER (Last, First, Middle Initial)						SSN		SIGNATURE							
RANK, PMOS/CBRANCH, ORGANIZATION, DUTY ASSIGNMENT								DATE							
c. RATER'S COMMENT: I understand my signature and the conditions specified or designated with the evaluation of the rated individual. I further understand my signature certifies that the information given in Part I, the rating (if made in Part II), the duty description to include the counseling dates in Part III, and the duty and rating periods are true in Part IV and correct. I have seen the report completed through Part I, except Parts III and IV, and the 1. Forwarded to NCO						SIGNATURE		DATE							
d. NAME OF REVIEWER (Last, First, Middle Initial)						SSN		SIGNATURE							
RANK, PMOS/CBRANCH, ORGANIZATION, DUTY ASSIGNMENT								DATE							
e. <input type="checkbox"/> CONCUR WITH RATER AND SENIOR RATER EVALUATIONS <input type="checkbox"/> NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL. (See attached comments)															
PART III - DUTY DESCRIPTION (Rater)															
a. PRINCIPAL DUTY TITLE						b. DUTY MOSC									
c. DAILY DUTIES AND SCOPE (To include: as appropriate, people, equipment, facilities and duties)															
d. AREAS OF SPECIAL EMPHASIS															
e. APPOINTED DUTIES															
f. COUNSELING DATES						INITIAL		LATER		LATER					
PART IV - ARMY VALUES/ATTRIBUTES/SKILLS/ACTIONS (Rater)															
a. ARMY VALUES. Check either "YES" or "NO". Comments are mandatory for "No" entries; optional for "Yes" entries.										YES		NO			
<div style="display: flex; align-items: center;"> <div style="text-align: center; margin-right: 20px;"> V A L U E S </div> <div> Loyalty Duty Respect Selfless-Service Honor Integrity Personal Courage </div> </div>										1. LOYALTY: Bearer true faith and allegiance to the U. S. Constitution, the Army, the unit, and other soldiers.					
2. DUTY: Fulfill their obligations.															
3. PERFECTED: Treat people as they should be treated.															
4. SELFLESS-SERVICE: Place the welfare of the nation, the Army, and subordinates before their own.															
5. HONOR: Live up to all the Army values.															
6. INTEGRITY: Do what is right - legally and morally.															
7. PERSONAL COURAGE: Face fear, danger, or adversity (physical and moral).															
Bulky comments															

DA FORM 2166-8, OCT 2001

REPLACES DA FORM 2166-7, SEP 97, WHICH IS OBSOLETE

DAFPM 11.01

Key to getting selected.... Or not

COUNSELING

(DA Form 2166-8-1)



- ✓ A right and not a privilege...oh by the way it is a regulatory requirement
- ✓ Goal is to make the soldier competitive for promotion and schooling
- ✓ Allows the system to protect the rights of the soldier
- ✓ Required in the inquiry/appeal process

NCO EVALUATION REPORT



- ✓ Not to be used as a counseling tool...but as an evaluation report
- ✓ Soldier's representation to the promotion board
- ✓ Identify the vast majority of successful NCOs who should be promoted on time
- ✓ Identify the very few best NCOs when selection rate is low
- ✓ A 3-month NCO-ER is just as important as a 12-month..... Complete-the-Record is under-utilized



DUTY DESCRIPTION

- ✓ Critical to Panels assessment of soldiers success and potential
- ✓ Give credit for what they do
 - ✓ If serving as a 1SG, then write it up as one (ie 13B40 = 13Z5M)
 - ✓ Important to list scope of supervision (ie number of soldiers supervising, equipment accountability, operational areas, etc...)
 - ✓ Acronyms should be listed and explained; special events/operations just as important
 - ✓ Appointed duties gives the whole picture



VALUES

- ✓ Comments are not required except if you check the "No" block
- ✓ "No" block is the "kiss of death".... Get an application to Wal-Mart...you are history...or at least you will retire in present grade
- ✓ Have the moral courage to tell it like it is... you are not fooling anyone especially the panel members



NCO RESPONSIBILITIES

- ✓ Easy to read "Bullet Format"
- ✓ Needs improvement: missed meeting some or all standards
 - ✓ Comments required
- ✓ Success: meets all standards, majority of ratings, and fully qualified for promotion
 - ✓ Comments not required but desirable
- ✓ Excellence: exceeds standards, special and unusual-achieved by only a few
 - ✓ Quantifiable / Justified in first bullet (not supported takes credibility from rating)
- ✓ Five excellence blocks....creates doubt



NCO RESPONSIBILITIES

- ✓ Competence, Leadership, and Training.....
 - ✓ Usually a very good "yardstick"
- ✓ Physical Fitness & Military Bearing.....
 - ✓ Disagree w/ DA Form 2166-8-1 examples; Measure the individual only
 - ✓ PT Scores are OK; if power lifter then say it; Growth is suspect
- ✓ Responsibility & Accountability.....
 - ✓ We expect you to maintain 100% accountability of your equipment



PERFORMANCE & POTENTIAL

- ✓ Rater:
 - ✓ Among the best: 3-5 excellence blocks
 - ✓ Fully capable: 1-2 excellence / all success blocks
 - ✓ Marginal: more than 1 needs improvement
 - ✓ List 3 duty positions at current or next higher grade (FA Branch has examples)



PERFORMANCE & POTENTIAL

- ✓ Senior Rater:
 - ✓ First bullet should to focus on promotion potential;
(Examples) promote now (1), promote ahead of peers (2),
promote with peers (3), retain (4), do not promote (5)
 - ✓ Schooling (NCOES)
 - ✓ Job performance and conduct should also be considered for
comments
 - ✓ Overall performance ratings are always equal to or higher
than potential ratings; (Examples) 1-1, 1-2, 2-2, 2-3, etc....



OVERWATCH

- ✓ Reviewer:
 - ✓ Insures counseling is accomplished
 - ✓ Insures Rater and Senior Rater "agree"
 - ✓ Can disagree with Rater and Senior Rater
- ✓ Commander's Inquiry:
 - ✓ Prevents injustices and corrects errors before NCO-ER becomes a part of the NCOs record
- ✓ Unit CSM/SGM:
 - ✓ Advisor to the rating chain
 - ✓ SMA Mission: Guardian of the NCO-ER system

Correlation



EXCEL- LENCE	SUCCESS			NEEDS IMPROVEMENT	
AMONG THE BEST			FULLY CAPABLE	MARGINAL	
1	2		3	4	5
SUCCESSFUL / SUPERIOR				FAIR	POOR
6	5		4	3	2
BEST QUALIFIED		FULLY QUALIFIED			NOT QUALIFIED

Rater

Senior
Rater

Selection
Board

DA
Guidance

SCORE WORD PICTURE (EXAMPLE)

6 +/- Exceptional Performer - Select Now
 5 +/- Strong Performer - Definitely Select
 4 +/- Solid Performer - Should Select
 3 +/- Qualified Performer - Select if Room

2 +/- Weak Performer - Retain in Grade
 1 +/- Poor Performer - Refer for QMP

NCO-ER System Information

EREC Update Fall/Winter 2001-2002



- ✓ New NCO-ER Regulation AR 623-205 released (17 Jan 2002)
- ✓ Clarified Policies and Procedures
 - ✓ Numerical APFT score no longer required/Statement "Awarded Physical Fitness Badge"
Note: APFT score still required when individual fails APFT
 - ✓ Elimination of NCO-ER requirements for CSMs in 3 & 4 Star Nominative Positions
 - ✓ Bullet comments begin with small letters and periods not used
 - ✓ Change of rated days for Complete the Record from 120 to 90
 - ✓ Establishment of a Senior Rater option report
 - ✓ Establishment of a 60-day short tour option report
 - ✓ Update on Line (www.perscom.army.mil) **Click on Adjutant General-Information A to Z scroll down to NCO-ER** also you can go to **EREC** (www.erec.army.mil)

NCO-ER System Information

EREC Update Fall/Winter 2001-2002



- ✓ Incorporated changes from MILPER Message 98-044
- ✓ Previous changes below already in effect and included in revised AR 623-205:
 - ✓ Retirement reports of less than one year are at option of rater, senior rater, or when requested by the rated NCO
 - ✓ Box marks may be either typewritten or handwritten
 - ✓ Frocked rank will be identified for the rated NCO and the rating chain
 - ✓ Weigh-in will be as of the last unit weigh-in or if no weigh-in, as of the THRU date of the report
 - ✓ Medical conditions may be cited for noncompliance with AR 600-9, "NO" entry is still required for not meeting the height/weight standard
 - ✓ Requirement to enter "within body fat standards of AR 600-9" is deleted

NCO-ER System Information

EREC Update Fall/Winter 2001-2002



- ✓ Currently three locations Testing the new "Field to File" Electronically NCO-ER by digital means straight from the unit to EREC
- ✓ Stats:
 - ✓ One in 25 reports are submitted with an error
 - ✓ One in 10 arrive late
 - ✓ 5900 annual NCO-ERs that are overdue
- ✓ Evaluation Report Appeal's Section has new (Attention Line)
 - ✓ ATTN: PCRE-RP-A
- ✓ MILPER Message # 02-122
 - ✓ Comments on Processing NCO-ERs Gaps
 - ✓ Instructions for Placement of Rater, Senior Rater, and Reviewers (AKO) E-Mail Address in Part IIID of DA Form 2166-8

NCO-ER System Information

Army Times Dated 4 June 01



- ✓ Update: Capabilities are now in place to allow soldiers and units to electronically File/View and Audit Documents ON-LINE at EREC anytime/anyplace
- ✓ Fewer soldiers screened for (QMP) separation started with the 2000 SFC Board
 - ✓ Restricted to soldiers in Primary/Secondary Zone for consideration
 - ✓ Included are soldiers who received (Bars to Reenlistment/Under Adverse Personnel Actions)
 - ✓ Included are all NCOs in MOS (02S)
- ✓ The (QMP) process was revised for two reasons
 - ✓ Reduced the workload on Boards/Enlisted Records/Evaluation Center
 - ✓ Senior Officials believed the extra reviews are not warranted



✓ Information off EREC Home Page

- ✓ Can call for appointment to review your OMPF (1-866-771-6357)
- ✓ The SFC Board in 2003 will have a 19 Month span instead of the normal 12 Month span; means more soldiers will be selected on this board; will not be a SFC Board in 2004

NCO-ER Update Dec 02

- ✓ Profile Information on the NCO-ER
- ✓ NCO-ER Appeals Guide
- ✓ Overdue NCO-ERs
- ✓ Invalid AKO Email Addresses on NCO-ERs (Info off EREC Home Page)
- ✓ Rated NCOs Signatures on the NCO-ER
- ✓ Reducing NCOES NCO-ER Curriculum Attrition



✓ Information of EREC Home Page

NCO-ER Update Mar 03

- ✓ More emphasis needed on NCO-ER quality, particularly in those prepared by officers and Army civilians
- ✓ Performance counseling is a vital part of the NCO-ER system
- ✓ Deploying issues with NCO-ERs
- ✓ **SFC Promotion Board** -- for those Staff Sergeants considered for promotion and only have one NCO-ER in their current grade; **Leaders will submit Complete the record NCO-ERs** for all Staff Sergeants with DOR of 1 Jun 01 thru 1 Oct 01 as an exception to policy. This one time exception to policy applies even if the duty position has not changed from the previous NCO-ER, provided rating officials meet minimum rating qualification. All eligible NCOs will be notified via their AKO accounts.

BOARD OBSERVATIONS

From Last 2002 SFC Board



✓ **NCO-ER is the key to getting selected or not.....**

- ✓ Assignments: No substitute for MTO&E experience; excellence while in the positions was seen as a reoccurring trend for the "most qualified" NCOs
- ✓ Concerned with number of NCOs working outside their PMOS such as Range Control, Instructor/Writers for extended periods of time – greater than 24 months or repetitive assignments
- ✓ Schools - Drill Sergeant, Observer/Controller, Battle Staff and experience significantly enhanced the effectiveness of NCOs
- ✓ Substandard performance trends for NCOs as recruiters on NCO-ERs
- ✓ Misconduct was not viewed favorably across the board
- ✓ Top 20% in NCOES showed clear trend for excellence
- ✓ Failure in an NCOES course was not viewed favorably
- ✓ Very few NCOs in Primary/Secondary zone had profiles; key was profile did not hinder NCOs ability to perform their duties
- ✓ Files w/profiles and or/APFT failures was not viewed favorably
- ✓ NCOs who had APFT excellence (90 each event) enhanced their evaluation

BOARD OBSERVATIONS

From Last 2002 SFC Board



✓ **NCO-ER is the key to getting selected or not.....**

- ✓ Vagueness on Duty Descriptions hindered the assessment process
- ✓ NCO and soldier selection boards as SGT Audie Murphy/SGT Morales Soldier/NCO of the Quarter and Year, were reoccurring indicators of excellence, pride and character
- ✓ Most Primary Zone NCOs had photos, many in Secondary zone did not
- ✓ Soldiers pursuing advance education while in tough leadership positions conveyed a strong message to the board, soldiers in TDA positions who passed up the opportunity for higher education also sent a clear message to the board
- ✓ Secondary Zone candidates had much older photos and fewer updates on their ERBs
- ✓ SSGs rating other SSGs showed trend of rating harder
- ✓ Inconsistencies between Rater's and Senior Rater's evaluations (Performance & Potential) cast significant doubt for voting panel members
- ✓ Several Promotion packets were missing ERB, DA Form 2-1 and or photo
- ✓ NCOs working outside their PMOS prior to serving in "branch qualified position" are disadvantaged when competing against their peers
- ✓ NCO-ER not annotated with new APFT requirement (Awarded the Physical Fitness Badge)

BOARD OBSERVATIONS

From Last 2002 SFC Board



✓ **NCO-ER is the key to getting selected or not.....**

- ✓ Subsequent NCO-ERs should state soldier is maintaining the Fitness Badge
- ✓ Many soldiers submitted documents that were on the OMPF already, their letters were viewed adversely as a means to get attention
- ✓ Writing to board only send the documents that are not on the OMPF
- ✓ Letters should not discuss self-evaluation about leadership, records should speak for themselves

BOARD OBSERVATIONS

From Last 2003 MSG Board



✓ **NCO-ER is the key to getting selected or not.....**

✓ Competence Assessment

- ✓ Panel made no special effort to treat the assessment of primary and secondary zone soldiers any differently
- ✓ Assessment criteria was the same for both zones
- ✓ Every MOS provided qualified candidates for promotion

✓ Physical Fitness

- ✓ A large number of soldiers exceeded the height/weight screening tables than one would expect
- ✓ Some cases, consistently high scores on PT test removed doubts about soldier fitness

✓ Recruiting Evaluations

- ✓ Clear difference was noted between NCO-ERs written in Recruiting Command and the rest of the Army
- ✓ NCOs detailed to recruiting duty almost always received weaker evaluations as Recruiters than while working more mainstream CMF assignments.

BOARD OBSERVATIONS

From Last 2003 MSG Board



✓ **NCO-ER is the key to getting selected or not.....**

✓ **Soldier Records**

- ✓ A few missing photos placed the soldiers at a clear disadvantage, most problems involved photos over 5 years in age, especially among secondary zone soldiers
- ✓ Few Enlisted Record Brief (ERB) and DA Form 2-1s were missing

✓ **NCO-ER**

- ✓ Inconsistencies between the rater and senior rater place the NCO at a disadvantage
- ✓ Panels may notice, but will not have the time to necessary to qualitatively assess the validity of EXCELLENCE bullet comments – it does not simply imply “downgrading” EXCELLENCE block checks when bullet fail to justify the mark
- ✓ Rater must foster an environment and set of responsibilities that afford the rated NCO opportunities to generate quantifiable performance at the EXCELLENCE level
- ✓ Up to the NCO to step up to meet available opportunities, rather than not be afforded the opportunity
- ✓ NCO-ER on narratives – we ought to restrict ourselves to recommending those who truly are the most deserving for promotion

BOARD OBSERVATIONS

From Last 2003 MSG Board



✓ **NCO-ER is the key to getting selected or not.....**

✓ **NCO-ER Continue**

- ✓ Numerous occasions where rater indicated satisfactory progress in the overweight program across multiple back-to-back NCO-ERs, but overall weight shown on these same NCO-ERs invalidated rater credibility
- ✓ Inconsistencies across the CMF in marking the correct block on the NCO-ER for (Physical Fitness & Military Bearing); If soldier was awarded the badge then clearly they should have been marked in the EXCELLENCE block instead of the SUCCESS block; it may be that chain of command placed their soldiers at a relative disadvantage during promotion consideration when they mark the wrong block

BOARD OBSERVATIONS

From Last 2002 SGM/CSM Board



✓ **NCO-ER is the key to getting selected or not.....**

- ✓ NCOs should be encouraged to do more than just "check the block" in key duty positions
- ✓ Strongest files had 36+ months as a 1SG with excellent performance
- ✓ Those selected for special duty assignments appear to be the best qualified in the branch
- ✓ Expand the opportunity for more senior NCOs to attend First Sergeant Course (Large number of First sergeants serving in position without attending the course)
- ✓ Photos of some candidates appear to be overweight, evaluation reports and AERs indicated they meet the standard
- ✓ No lack of leadership positions which allows NCOs to achieve maximum time in leadership positions; those that desired have multiple chances to gain key leadership positions
- ✓ Branch should not allow NCOs to spend too much time in TDA positions
- ✓ Files with all or predominate TDA leadership tended to not compete as well
- ✓ Secondary zone NCOs performing at the next higher level increased their competitiveness for promotion
- ✓ NCOs in secondary zone needed to have spent most of his/her time in their Primary MOS

BOARD OBSERVATIONS

From Last 2002 SGM/CSM Board



✓ **NCO-ER is the key to getting selected or not.....**

- ✓ NCOs that took the tough jobs early (1SG and SGM/CSM positions) and performed well, increased their competitiveness
- ✓ NCOs who exhibit competence throughout the spectrum of assignments will continue to be most competitive
- ✓ NCOs need to be aware of and have the opportunity to be assigned to special duty assignments
- ✓ Those files that were most impressive had TO&E time coupled with special assignments (CTC OC, Drill Sergeant, Recruiter, AC/RC) and some TDA time



BOARD OBSERVATIONS (Checklist)

- ✓ 1 July 2002 (IVRS) shut down no longer can you Order OMPF (Microfiche); New system (IWRS) is in place
 - ✓ Review at least 4-6 months prior to scheduled board dates
 - ✓ Check for all NCO-ER/AERs, awards to include certificates, civilian and military certificates or transcripts, Audie Murphy/Sgt Morales, removal of derogatory information (Art 15, GO Ltrs of Reprim, bad NCO-ERs, etc.) for possible transfer to restricted fiche, IAW AR 27-10
 - ✓ Verify all documents pertain to you not someone else

BOARD OBSERVATIONS (Checklist)



- ✓ Get **current** photo done at least **3 months prior** to scheduled board date, Photo in serving grade is a must
 - ✓ The Army says every 5 years (AR 640-30), recommend **1st time** in **secondary** and **primary zone**, not to exceed once every 2 years
 - ✓ Have at least **2 senior NCOs** (CSM/1SG) check it for you
 - ✓ Get fresh hair cut and shave (recommend **no mustache**)
 - ✓ If you need a new uniform (the old one shrunk on you) then get one
 - ✓ Check AR for proper ribbons and order of precedence
 - ✓ Wear glasses, ensure glare doesn't detract/no visible decorations
 - ✓ Jewelry, only a wedding and/or engagement ring visible
 - ✓ Length of nails/lipstick/nail polish conservative and complement
 - ✓ Male/Female recommend long sleeve shirt tie/neck tab
 - ✓ Sleeves/Trousers/Skirt correct length
 - ✓ Ensure service stripes match years of service/Good Conduct Medal
 - ✓ Ensure shoes are shined or clean and edge dressing applied
 - ✓ Stand at position of attention

BOARD OBSERVATIONS (Checklist)



- ✓ Review **DA Form 2-1** (PQR= Personnel Qualification Record) and the new **Enlisted Records Brief** (ERB)
 - ✓ Take a copy of your **personal** records with you if you do the review at AG:
 - ✓ All **awards** (orders and certificates)
 - ✓ All **military transcripts** (to include correspondence courses)
 - ✓ All **civilian education transcripts**, even if you only have 3 semester credit hours
 - ✓ Permanent profiles
 - ✓ If you see / don't see or understand an entry then ask the clerk to point it out or explain it to you... **remember this is your record**
 - ✓ **Ensure all common information matches such as NAME, SSN, GRADE, DOR, PMOS, SMOS, MIL ED, CIV ED, REEN eligibility/ineligibility, SEX, RACE, DOB, ETHNIC GP, BASD, BESD (2-1 ONLY) etc.,**

BOARD OBSERVATIONS (Checklist)



- ✓ Letters to the President of the Board should be **short, concise and factual** about missing documentation only not covered in your OMPF/PQR
 - ✓ **Do not ingratiate yourself** to the panel members...Nobody wants to hear about how great you are... this works against you!
 - ✓ Unable to submit Complete the Record NCO-ER - list Effective date, Position, Duties
 - ✓ Let your record speak for you... panel members will not use anything in your letter, only the documentation that is presented
 - ✓ Use correct grammar, punctuation and spelling
 - ✓ Address to board president, include complete SSN and sign it
 - ✓ Have your CSM/SGM/1SG look at your letter
- ✓ Review video on Selection Board Process



UP COMING BOARDS

- ✓ SFC Board 29 May – 24 Jun 2003
- ✓ SFC Board 2004 N/A
- ✓ MSG Board 3 Feb – 27 Feb 2004
- ✓ MSG Board 5 Oct – 29 Oct 2004
- ✓ CSM/SGM/SMC Board 1 Oct – 22 Oct 2003
- ✓ CSM/SGM/SMC Board 3 Jun – 24 Jun 2004



For more information contact the :

Field Artillery Proponency Office
(FAPO)

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